

Agency/Dept./Division: _____ **Manager:** _____ **Date:** _____ **Year(s) applicable:** _____

[illegible]

- Mission: Position is a key contributor to the organizational mission.
- Critical Function: Position performs task critical to vital functions. Leaving it vacant would hinder or prevent success of mission.
- Specialization: Position provides specialized leadership or skills that are difficult to replace.
- Location: Position fills a unique and important capacity at a particular location that would be difficult for another position, or the same position in another location, to take over.
- High Turnover: Position is one in a class or occupational group vulnerable to high turnover.

(based on Iowa & other sources)

Succession Planning Template

Step 2: Position or Position Group Analysis

Agency/Dept./Divison: _____ **Manager:** _____ **Date:** _____ **Years Applicable:** _____

Key/Critical Position/Class:		Position Title or Job Class:
Reason position/class is key/critical:		Retirement Eligibility Date (if applicable):
External Factors:	Internal Factors:	How position will be used in the future:
What competencies or skill sets will be required?		
Current level of readiness to replace departing staff:		
Gaps – competencies or skill sets not possessed by current staff:		

Include additional pages as needed for each position or class

(based on Iowa & other sources)

Succession Planning Template

Step 3: The Succession Plan

Agency/Dept./Division: _____ Manager: _____ Date: _____ Years Applicable: _____

Key Positions/ Classes	Highest Priority Gaps in skills/competencies	Highest Priority Strategies to address Gaps	Target Complete Date	Person(s) Respon- sible	Required Resources	Status/Progress

Include additional pages as needed

(based on Iowa & other sources)